

511 Regional Rideshare Program
Standard Operating Procedures



**COMMUNICATIONS AND
PUBLIC RELATIONS DEPARTMENT**

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Job Description: Communications and Public Relations Manager

EDUCATION AND EXPERIENCE REQUIREMENTS:

Bachelor's degree in business/marketing or equivalent work experience in product/service marketing, public relations, consumer communications, consulting or professional services. Work experience in behavior change industry(s) preferred. Excellent communication skills including strong public speaking ability to work in a team management environment and demonstrated client relationship management skill. Proficiency in the Microsoft suite of software, budgeting and financial systems and comprehensive knowledge of the San Francisco Bay Area and its transportation system. Experience in print, broadcast, online and social media as well as project and campaign production management needed. Basic skills/familiarity with Adobe CS and Web-related software as well as media buying experience helpful.

JOB SUMMARY:

The Communications and public relations manager supports placement of commuters into carpools and vanpools as well as efforts to increase use of non-drive-alone modes of travel through the 511 program. The primary two roles include:

- 1) to create opportunities for commuters to view changing travel modes are in their self-interest (e.g., what will create change from single-occupant vehicle commuting to a ridesharing mode) and
- 2) to communicate 511 Rideshare services/events/incentives in a compelling and useful way resulting in commute travel mode change.
- 3) support client and outreach staff requests for methods and tools that deliver 511 Rideshare messages/services to Bay Area business and partner organizations

The Communications and public relations manager is responsible for developing and implementing methods of communicating 511 Rideshare-related opportunities to employers, commuters, and others. Marketing, advertising, public awareness, and media relations are key features of this position. The role includes cross-selling ridesharing information with other 511 requests and other related MTC operational projects, (e.g. FastTrak, Clipper). Additionally, the communications and public relations manager will be responsible for research and development of marketing materials to support the employer, commuter and vanpool services units that follow the 511 branding consistency.

MAJOR RESPONSIBILITIES:

- Develop a marketing and integration plan based upon the goals of the 511 Rideshare Regional Program and the MTC contract deliverables
- Initiate new projects and programs designed to expand Rideshare services and public participation and knowledge
- Review and stay current with all applicable market research regarding commuting habits, patterns and media. Continually scan the industry for best practices that can be adapted to reach target audience(s).
- In cooperation with the 511 evaluation manager, write questions for the annual client survey, employer surveys and other surveys, extract relevant information and apply data to the structure and delivery of 511 Rideshare marketing, messaging and incentive programs.
- Manage the creation, implementation and management of marketing incentive programs, including fulfillment and evaluation activities.
- Oversee the 511 rideshare Web site content, implementing update and interfacing with regional partners and sub-consultants as appropriate. Work with the 511 project manager, IT manager, commuter services manager to identify and implement necessary technological applications to maintain and enhance the ridesharing Web site within the 511.org Web portal

- Serve as the media contact for 511 Rideshare, including initiating stories/news releases, while coordinating with MTC's Public Information Office [REDACTED], fielding media inquiries, training and scheduling 511 Rideshare spokespersons, and conducting interviews.
- Work with Employer and Vanpool Services to identify target markets and strategies for each service
- Participate in and assist with the direction of MTC's Marketing Working Group meetings. Meetings are held quarterly and cover coordination between regional program and delegated county programs.
- Coordinate and work with other MTC operation project managers including monthly update meetings.
- Work and coordinate with representatives of delegated county transportation organizations and congestion management agencies as well as attend marketing working group meetings of the TAC.
- Manage the 511 Rideshare marketing budget, including managing sub-consultants/vendors, professional services, direct expenses and staff.
- Manage a consistent 511 brand identity program including advertising/promotional campaigns, public and community relations campaigns, program sponsorships, and incentives.
- Distribute and inform regional promotional and campaign information delegated county representatives.
- Supervise the marketing associate staff members in all described tasks and responsibilities
- Proficiency in the Microsoft and Adobe CS software suites
- Working experience of online, broadcast and print production
- Working knowledge of commonly-used social media tools and participation in MTC's social media working group
- Oversee and provide style, writing and graphic support, production and delivery of outreach materials for Employer and Vanpool services
- Other duties as assigned

STAFF

Job Description: Marketing Communications Associate

REQUIREMENTS:

Bachelor's degree in marketing, communications or equivalent work experience in marketing, public relations, customer service, consulting, or professional services, excellent organizational and communication skills, proficiency in the Microsoft suite of software. Working knowledge of Adobe CS, media and advertising production.

JOB SUMMARY:

The primary role of the marketing communications associate is to support the communications manager in all tasks related to marketing and communications of 511 Rideshare. The marketing communications associate is responsible for a variety of tasks including oversight of marketing material production, coordination with printers, designers and other marketing service vendors, organizing and maintaining inventory of marketing materials, supplies and resources. The marketing communications associate is also responsible for incentive fulfillment and inventory control.

MAJOR RESPONSIBILITIES:

Assist the communications manager in all tasks related to marketing and communications of 511 Rideshare, including but not limited to:

- manage production of collateral, including brochures, promotional items, press kits, and more

- interface with printers and other firms producing final materials; track production from start to finish
- interface with designer(s) regarding price and design or edit changes requested by communications manager
- obtain competing bids from printers and various vendors for specific projects and materials
- maintain inventory of all in-house media and marketing collateral
- manage incentive fulfillment and maintain inventory of all in-house incentives/prizes
- order/ maintain inventory of all basic office supplies
- manage circulation of design drafts to staff for approval
- receive and manage all product request forms from staff (including reprints, new materials or promotional items)
- work with communications manager to organize and catalogue graphic/communications/marketing files to in-office server
- distribute news media materials and collateral to requesting parties
- research news articles when requested by manager or client
- distribute news releases to applicable/appropriate reporters and follow-up with phone calls under manager's supervision
- produce marketing collateral utilizing the Microsoft and Adobe CS software suites
- work with outreach staff to provide support collateral as needed

STAFF

Job Description: Events Coordinator

REQUIREMENTS:

Bachelor's degree in business/marketing or related field, or equivalent work experience in sales, outreach or customer relations. Experience in customer service, outside sales, or professional services. Excellent interpersonal and networking skills as well as good time management skills required. Ability to manage multiple events, good public speaking and comfort working with a diverse group of individuals. Ability to interface with people at public and worksite events required. Good written communication and an ability to be resourceful. Minor event experience and planning required. Proficiency in MS Office software, comprehensive knowledge of the San Francisco Bay Area and its transportation system a must. Possession of a valid CA driver's license required.

JOB SUMMARY:

The primary role of the event coordinator is to coordinate and attend events, commuter promotions/fairs. The event coordinator must be extremely knowledgeable of the San Francisco Bay Area commute and transportation options for the purposes of encouraging commuting via carpool, vanpool, transit and bicycle. The event coordinator, in cooperation with employer services representatives, will work with ETCs and event coordinators to create awareness, generate matchlist requests, and educate event attendees about commuting options..

The secondary role of the event coordinator is to function as an associate and supporting member of the marketing department. This responsibility includes continuing the integrity, consistency and message of the 511 Rideshare. Responsibilities include the role of a business and community liaison, aid with large marketing events (i.e. news conferences, community events, etc.), assistance with securing and negotiating partnerships, and collateral coordination for the department and special events.

MAJOR RESPONSIBILITIES:

- Coordinate with employer service representatives, event planners, and other sources to conduct and participate in job fairs, employer transportation, health, and safety events of all to generate matchlist request and vanpool leads from these events. Provide accurate and candid assessment/critique of events and offer options and or improvements for future events.
- Collaborate with the marketing communications associate to create customized commute messages for events that meet the needs of and are consistent with the transportation options of that specific area. Provide assistance with 511 Rideshare collateral and other transportation/transit related materials. Work with marketing staff to facilitate a timely and accurate delivery of event deliverables such as posters, signage, flyers and other collateral.
- Coordinate with employer service representatives, establish sales call procedures, and review the 511 Rideshare marketing database to identify employer contacts and generate opportunities to coordinate events including but not limited to; tabletop displays, lunch-and-learn meetings, and full-scale transportation/health/safety fairs.
- When the situation warrants, promote events using different communication strategies, such as e-mails, correspondence, and phone calls.
- Work with marketing staff to coordinate promotional materials and supplies for local events and onsite employer health/benefits fairs.
- Work with marketing staff to accurately maintain inventory of promotional materials including bags, pens, prizes, and other items.
- Maintain and update information in the events section of the marketing database to ensure proper reporting of matchlist generation for employer service representatives.
- Work closely with marketing staff in securing partnerships with local businesses and organizations to develop viable community opportunities for the promotion 511 Rideshare.
- Develop and conduct event training for new 511 Rideshare employees.
- Participate in the development of employer promotions and events workshops.
- Provide consistent and accurate records and documentation of solicitations, correspondence and dialogue with potential partners.
- Support marketing staff in the implementation of incentive programs and evaluation activities.

COMMUNICATIONS/MARKETING TEAM RESPONSIBILITIES**Management / Budgeting / Administration**

- Manage department costs and yearly budget;
 - Annual fiscal budgets are determined with and overseen by the Project and Operations Manager. [REDACTED]
 - Bi-weekly expenditure reports from the Project Administrator are used to confirm or readjust working budgets.
 - Keep one copy of all marketing invoices by vendor/fiscal year in project manager's office files;
- Keep shared and final files of projects and supporting documents [REDACTED]
- Keep final files of all marketing programs/projects/collateral [REDACTED]. This will include materials produced in-house as well as through PB Graphics and freelance services.

- Work with client and partner agencies, transit providers and other organizations to maintain inventory of brochures and other collateral in collateral library located in south side of 511 Rideshare project office
- Keep archived copies of all marketing materials in by fiscal year;

Keep shared and final files [REDACTED]

Marketing Plan and Development

- Develop annual marketing plan for approval by MTC and the Rideshare TAC.
- Develop and write annual fiscal marketing outline for 511 Rideshare
 - Outline will include annual project and contractual goals, publicity targets, media strategies and marketing programs
 - [REDACTED]
 - Strategies and tactics tied to annual goals using best practices and market research from annual survey
 - Program and plan for marketing expenditures of advertising, collateral, production, media services
 - Goals of plan will be co-developed by project manager, operations manager and appropriate MTC representatives
- Brainstorm quarterly both internally and with media/marketing consultants;
- Review and summarize projects and effectiveness in reaching project goals
- Explore new avenues to maximize and leverage media and budget
- Review and explore other rideshare programs that could be adapted to Bay Area

Reports to MTC

- Write monthly Marketing updates, due first of month. These updates are included in a MTC internal marketing memo;
- Write Marketing section of quarterly reports for Rideshare evaluation manager. These updates are sent to the BAAQMD and other stake holders;
- Write monthly Marketing progress reports;
- Write other marketing/media based reports and summaries as requested by MTC;
- Maintain archive of all reports [REDACTED]

Web Site Maintenance / Coordination

- Post news releases, publicity, coverage/stories on newsroom page of Rideshare Web site;
- Continually monitor/review website for accuracy, missing links, dated material and appropriate content
- Maintain newsroom page with current material;
- Re-write, edit, update and simplify content when necessary;
- Adjust and edit per MTC requests
- Posted documents and Web page edits are coordinated through PB ProjectVis (Co. 39) [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- Communications staff has content-control with the rideshare scrolling news, media page documents, question/poll-of-the-week, and employer downloads documents.

- PB Project Vis can accommodate any Web site edits, programming, design, graphics and functional changes. If needed edits can be made on weekend and holidays with advance notice.
- 511 Rideshare staff and PB ProjectVis staff works within the page templates provided by Swirl (agency for 511)

Media / Media Relations

News Releases and Advisories

- Draft news releases as needed
 - Submit internally and to MTC for review;
 - [REDACTED]
 - Allow approximately two days for MTC review.
 - Distribute via e-mail, brief summary and PDF of news releases to appropriate transportation, business, general or regionally-specific reporters/bloggers
 - Distribute through PRNewswire, PRWeb and / or in-house list.
 - [REDACTED]
 - Draft media advisories for events
 - Submit internally and to MTC for review; one week in advance of distribution
 - Distribute to in-house media list, PRNewswire and / or PRWeb;
 - Send advisory one week in advance of event, followed by a second advisory 24 hours before the event.
 - Pitch reporters by phone/e-mail, contact reporters, assignment editors one week in advance of any event. Follow-up with two-hour notice to assignment editors.
 - Keep county partners informed of media releases and media events.
 - (Distributions List Attached)
 - Follow-up all media interaction/interviews/conversations with event summary e-mail to [REDACTED]
- Example e-mail includes:
- Publication / Network / Media: --
 - Story Date: --
 - Journalist(s): --
 - Contact Date(s) and Follow-up: --
 - Story/Conversation Detail(s): --
 - Highlights / Talking Point(s):
 - Result(s) / Outcome: --
- Pitch reporters on news releases and events with personal phone calls;
 - Continually update in-house media list with other sources;
 - Read news headlines every day;
 - Respond to breaking news when relevant;
 - Respond immediately to any reporter's query, send background info, and refer to other experts.

Media Events / News Conferences

- Draft talking points for event speakers/guests/staff/client

- Brief and train appropriate people on talking points
- Determine locations, confirm venue for media event
- Create visuals and media packets with event-specific information and 511 Rideshare facts and details
- Distribute hard copies at events, distribute soft copy via e-mail PRNewswire
- Schedule events appropriate to media coverage
- Collect reporter contact info and update internal media list.
- Communications and Public Relations Manager's media outreach – such as lunches, invitations to media events, distribution of background materials – should be ongoing.

Social Media

- Update, send/post Twitter updates to: twitter.com/511Rideshare
- Re-tweet appropriate tweets from twitter.com/511SFBay
- Respond to individual followers' tweets as needed
- Post weekly to 511 Facebook page: facebook.com/511SFBay. Post any community/public events where Rideshare staff will be attending. Post weekly employer event summary, listing worksite names/companies that have approved worksite postings by respective company ETCs.
- Update and monitor 511 Facebook page as needed
- [REDACTED]
- [REDACTED]
- Post/update Facebook advertising as needed
- Tweet 511 Rideshare messages through Twitter or Twitter third-party [REDACTED]
- [REDACTED]
- Respond to, or forward requests, questions or inquiries
- Monitor Google alerts, MTC library alerts for 511, 511 Rideshare, carpool/vanpool and appropriate promotional campaign or programs
- Monitor transportation blogs and respond/post when appropriate (approve response with MTC)
- Work with MTC's social media working/coordination group
- Stay current on trends/developments in applications and uses
- Facebook advertising is utilized when appropriate for incentive or message advertising
- [REDACTED]

Media Requests / Media Inquiries / Interviews

- Respond immediately to media calls;
- Confirm reporter's deadline;
- Prepare in advance; gather all facts and related news articles;
- Respond to all statistical inquiries in writing (when time permits)
- Pre-screen carpool participants for talking points and comfort-level with media, public speaking
- When stories/events warrant statements from someone aside from the communications manager, the communications manager must "media train" staff, invited guests, rideshare participants to verify spokespeople:
 - Hone talking points ;
 - Rehearse major points and sub-points;
 - Speak concisely
- Follow-up with brief written summary to Media Activity Summary List

News Clipping, Monitoring and Evaluation

- Track coverage and keep copies of news clippings with BurrellsLuce
- Maintain account with clipping service for major news releases and stories through [REDACTED]
- [REDACTED]
- Keep printed copies in three-ring binder kept at marketing communications associate's desk
- E-mail prominent news stories (URLs) to media activity summary list (see news releases/advisories)
- Keep hard and soft copies of online publicity: [REDACTED]
- [REDACTED]
- After each event or promotion, prepare final media report for MTC;
- Circulate important stories to 511 Rideshare managers and Commuter Services Department

Research

- Research trends in online marketing, broadcast, direct mail, print and outdoor
- Identify and evaluate programs to leverage data from annual 511 Rideshare Client Survey
- Work with Evaluation Manager to spot changes, trends in survey response and data
- Integrate survey data into overall marketing plan for next fiscal year;
- Utilize survey data to target viable submarkets and demographics
- Identify, plan and coordinate one vanpool and one carpool focus group per fiscal year from existing 511 Rideshare participants
- Identify media opportunities and saleable story ideas for the calendar year and include in Marketing strategic plan;
- Maintain files of relevant local, regional and national news articles;
- Collect and monitor applicable information as available from TDM listserv, MTC headlines, ACT, 511 reports, Rideshare Urchin reports, "Rideshare Rewards" database, etc.
- Stay current with TDM research from ACT, National Center for Transit Research/CUTR and other sources. Apply best practices, applicable secondary- and tertiary-research data, and industry standards as appropriate to program marketing.

Production: Web / Broadcast / Print / Collateral

- Develop marketing materials that adhere to and maintain 511 Brand Guidelines;
- Review final designs with MTC (and applicable corporate sponsors);
- Post materials and documents online when appropriate;
- Write and distribute monthly employer newsletter;
 - Commute Chronicle is published six (6) times per year.
 - Occasional special editions are broadcast
 - Newsletter is distributed by county e-mailing list through Constant Contact
 - [REDACTED]
- Submit samples of all collateral to MTC to ensure compliance with BAAQMD and other fund-source requirements.
 - Flyers, brochures, posters, e-mail, e-newsletters, fact sheets, sales sheets, etc.
- Coordinate marketing efforts with MTC on the promotion of other 511 tools, services and programs (e.g., Transit Trip planner, 511 widgets, 511 mobile and apps.
- Develop radio script concepts and traffic sponsorships internally or with ad agency;
 - Who to use or how to go about selecting an agency to use.

- Develop TV spots and campaigns when needed; need based upon goals, effectiveness, target audience, past successes and budgetary guidelines
- Submit final creative scripts, ads and storyboards to MTC for review. (Submit to: MTC distribution list / review time,)
- Integrate and utilize social media (Facebook/Twitter) for campaigns/promotions
- In-house Materials:
 - Determine quantity, budget, production and approval timeline;
 - Maintain and adhere to 511 Brand Guidelines
 - Determine in-house or external production
 - External production resources include:
 - PB Graphics
 - Freelance artists and writers
 - Circulate drafts to requesting staff members w/cc to:
Operations and ESR Manager
 - Forward final drafts of all materials to MTC for review and approval
 - [REDACTED] determine who at MTC needs to approve materials/documents, circulate to [REDACTED]
 - Post final materials online when appropriate

Collateral Materials: Distribution / Filing / Library Maintenance

- Maintain working library and supply of current 511 Rideshare collateral in the south section of the 511 Rideshare project office
- [REDACTED]
- CSR and Marketing communications associate will review supplies monthly for inventory and reorder/reprinting needs
- Order reprints/supplies of all 511 Rideshare materials as fiscal budget allows
- Collateral materials, including event/worksite giveaways must have some post-consumer recycled content. This includes, paper, plastic, metal, fiberboard and other construction materials. All materials should be labeled appropriately/correctly with recycled content.
- When collateral material has sufficient printing/display space, the following logos must appear: 511 and/or 511 Rideshare, MTC and BAAQMD. Whenever, MTC and BAAQMD logos are used on collateral, a product proof must be approved by appropriate MTC staff.
- Work with CSRs, VCs and ESRs on maintaining suitable supplies of companionable materials from other 511 and Bay Area transportation organizations
- Communications Manager and Marketing communications associate (in conjunction with IT Manager) will maintain working online/server library of softcopies (PDFs) of all appropriate 511 Rideshare collaterals
- Files will be named and filed [REDACTED]
- Marketing staff will periodically review of all 511 Rideshare materials for appropriate updates and edits

Incentive and Promotional Campaigns

- Stay current of national TDM campaigns; Through TDM ListServ, ACT, etc.
- Participate and lead development of regional marketing program(s) and review internally, with partners, and MTC;
- Incentive text is provided to IT manager for posting on the RMS log-in and individual account pages
- Evaluate programs by reviewing number of participants, vehicle miles reduced, emissions reduced, costs per person placed, satisfaction levels with calculation assistance from Evaluation Manager
- Develop list of potential sponsors, and contact for co-op marketing campaigns;
 - Maintain and strengthen active relationships with current sponsors;

- Coordinate current and potential sponsorships with MTC Project Manager
- Keep a file of partner and corporate logos for co-op campaigns:
- Coordinate regional campaigns with county partners and MTC Marketing Working Group.

Vendors Use and Management

- Continually compare and contrast production vendors for best price and quality. Ensure that all distributed materials contain some post-consumer content. DBE should be given fair consideration when searching for and seeking marketing services, materials and supplies. Current vendors include, but are not limited to:
 - PB graphics/copy writing—collateral
 - PB Project Visualization (Co. 39)—standard Web site maintenance and edits
 - Swirl—advertising and media buying/planning
 - PGFX—BannerUps
 - Quad Express—printer
 - A. Maciel Printing
 - Elite—printer
 - Melrose Nameplate and Label Co. Inc. —vanpool magnetic signs
 - SuperPrint—stationery and business cards
 - Getty Images.com (stock photography)
 - GBC
 - BurrellsLuce
 - Proforma – incentives
 - Anderson – incentives
 - Clear Channel (radio traffic network)
 - Westwood One (radio traffic network)
 - SVM – incentive cards
 - Ghirardelli Chocolate - coupons

Incentives and Fulfillment

Incentives

One of the features of the RMS is tracking and incentivizing commuters' via their travel choices. Rideshare registrants may track daily commuting trips and log the miles and modes of transportation. Regional incentives are currently listed on most RMS log-in pages, and featured in the incentives window when a RMS users is logged-in to his/her account.

Incentives currently reward people for carpooling to work. Give-aways and incentives have included: Ghirardelli Chocolate coupons; Safeway Gift Cards; gas gift cards, iPods and iTunes gift cards; Peet's Coffee & Tea gift cards/coupons/merchandise, Beach Blanket Babylon tickets, cinema tickets and other items.

Incentive Details will include:

Eligibility and Prize Details:

Eligibility and details will vary on promotion goals and objectives. All incentive programs will be designed to change transportation/commute behavior, increase the profile of 511 Rideshare services and encourage sustainable transportation choices to residents of the 511 service area.

Participation Guidelines/Requirements:

Eligibility and details will vary on promotion goals and objectives

Promotion Duration:

Eligibility and details will vary on promotion goals and objectives

Fulfillment Schedule

Currently, fulfillment is coordinated twice per month for reward/incentive programs.

Customer Service Info

FAQs, contact information, phone and e-mail assistance/response

Fulfillment Process

1. A report is generated listing all active trip diaries and entries for a 14-day period prior to the fulfillment week. [REDACTED]
2. Marketing communications associate, reviews report with communications manager and verifies eligible recipients for the incentive period. Eligibility is based on promotional guidelines listed above. [REDACTED]
3. [REDACTED]
4. [REDACTED]
5. [REDACTED]
6. [REDACTED]
7. Summary of incentive period/promotion is included in monthly renewable services report. [REDACTED]